

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Lester Pasquale (CONS/E)

Case No. 0200973

Atty

Kruthers, Heather H. (for Public Guardian – Conservator)

Twentieth Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

Age: 62			PUBLIC GUARDIAN, Conservator, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	1 Nood wood of conice of Notice of
			Account period: 7-1-11 through 6-30-13	 Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing on the
	Aff Code VACI		Accounting: \$435,414.48	office of the Veterans Administration per Probate Code §1461.5.
	Aff.Sub.Wit.		Beginning POH: \$368,224.50 Ending POH: \$346,393.81	
<u> </u>	Verified		Enaing FOn. \$340,393.01	
	Inventory		Conservator: \$526.40 (for 2 Deputy hours @	
	PTC		\$96/hr plus 4.4 Staff hours @ \$76/hr)	
	Not.Cred.			
~	Notice of		Attorney: \$1,250.00 (less than local rule)	
	Hrg			
~	Aff.Mail	W	Bond fee: \$1,906.08 (ok)	
	Aff.Pub.		Petitioner prays for an order:	
	Sp.Ntc.		Approving, allowing and settling the	
	Pers.Serv.		account as filed;	
	Conf.		Authorizing the conservator's and	
	Screen		attorney's fees and commissions;	
	Letters		3. Payment of the bond fee; and	
	Duties/Supp		4. Any other orders the Court considers	
	Objections		proper.	
	Video			
	Receipt			
>	CI Report			
	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 8-22-13
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 1 – Pasquale

Atty Smith, Jane T., of County Counsel's Office (for Petitioner Public Guardian)

(1) Third and Final Account and Report of Conservator, (2) Petition of Allowance of Compensation to Conservator and Attorney

DOD: 2/15/2013		PUBLIC GUARDIAN, Conservator of the Estate, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 12/11/2012 - 2/15/2013	
		Accounting - \$97,089.23	Note: Proposed
		Beginning POH - \$96,989,19	order finds in
Cont. from		Ending POH - \$97,009.23 (\$2,009.23 cash)	Paragraph 4 that
	Aff.Sub.Wit.		Petitioner is
1	Verified	Subsequent Account period: 2/16/2013 – 4/9/2013	authorized to pay
<u> </u>		Accounting - \$97,448.06	County Counsel
	Inventory	Beginning POH - \$97,009.23 Ending POH - \$1,276.00 (all cash*)	\$325.00 for legal
	PTC	Ending POH - \$1,276.00 (all cash*)	services, while the
	Not.Cred.	*Life estate interest expired upon Conservatee's death.	Petition states in
	Notice of Hrg		Paragraph 7 the
<u> </u>		Conservator - \$1,841.08	requested fees for
✓	Aff.Mail V	(14.23 Deputy hours @ \$96/hr and 6.25 Staff hours @ \$76/hr)	County Counsel
	Aff.Pub.		are \$312.50 .
-		Attorney - \$312.50	Proposed order has been
	Sp.Ntc.	(per Local Rule, \$1,250/year x 1/4 year)	interlineated to
	Pers.Serv.		
	Conf. Screen	Bond fee - requests waiver	change the attorney fee
	Letters	(due to small estate and short account period)	amount to \$312.50
	Duties/Supp	Petitioner states the Conservatee had a life estate interest in real	as consistent with
	Objections	property that expired upon his death; the Public Guardian was in	the Petition.
	Video	the process of selling the property in order to pay fees for his needs	
	Receipt	when the Conservatee died; the remainder beneficiaries, FIRST	
	CI Report	ARMENIAN PRESBYTERIAN CHURCH and the CALIFORNIA	
	9202	ARMENIAN HOME, recognized this, and without any legal	
		obligation, gave a check for \$17,000.00 to offset some of the fees	
✓	Order	incurred by the Public Guardian and County Counsel; putting the	
	Aff. Posting	\$17,000.00 and current \$1,276.00 cash on hand toward fees, the	Reviewed by: LEG
	Status Rpt	total outstanding balance of fees will be \$7,084.70 ;	Reviewed on: 8/23/13
	UCCJEA	Petitioner requests that due to the insufficiency of the estate a lien	Updates:
	Citation	of <u>\$7,084.70</u> be imposed against the deceased Conservatee's	Recommendation:
		estate for the unpaid balance of authorized fees and commissions.	SUBMITTED
	FTB Notice	(Liens for fees and commissions for previous accounts existed as	File 2 – Setrakian
1		follows: 1st Account - \$6,663.60 for Public Guardian; \$1,700.00 for	
1		County Counsel; 2 nd Account - \$12,843.52 for Public Guardian;	
		\$2,000.00 for County Counsel.)	

Atty

3

Adam Carbajal Special Needs Trust
Walters, Jennifer L. (for Maria Alvarez-Garcia, Trustee)
Balance of Motion for Withdraw of Funds

Grandmother, Guardian, and Trustee, is Petitioner. Nothing further has been filed with regard to the Examiner Notes previously noted:	
Petitioner requested distribution of \$33,555.39 for reimbursement/ remodeling/ Adam's necessities, and \$1. Second account is due. No account has yet been filed. The Court may require accounting prior to consideration of this request.	
Inventory reimbursement of filing fees. PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters reimbursement of filing fees. 7 The request included kitchen repair totaling \$28,000.00 for Adam's benefit (see contractor's quote Exhibit F) An additional declaration was filed 7-23-13. Conf. Screen On 7-24-13, the Court approved certain reimbursement/expenses/ 3. Need proof of lien for trust per Court order	a ´ nets iir;
Duties/Supp attorney fees, but set the matter of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing. 1-30-12. Upon settling the first account, the Condens of the kitchen repair for \$28,000.00 for further hearing.	der ce it er, s en
Aff. Posting Reviewed by: skc	
Status Rpt Reviewed on: 8-23-13	
UCCJEA Updates:	
Citation Recommendation:	
FTB Notice File 3 - Carbajal	

Kruthers, Heather (for Public Administrator)

Report of Administration of Insolvent Estate

	Report of Administration NEEDS / PROPERTY COMMENTS					
DOD: 6-21-01			PUBLIC ADMINISTRATOR was appointed as Administrator of the estate on 8-9-12 and	NEEDS/PROBLEMS/COMMENTS:		
			Letters issued on 8-30-12.			
			Leners issued on 6-30-12.			
			Petitioner states the only asset of the estate			
			was real property that was foreclosed upon			
	Aff.Sub.Wit.		within two months of Petitioner's			
~	Verified		appointment. No Inventory was ever filed			
	Inventory		and Petitioner never had control of any			
	PTC		assets.			
	Not.Cred.		Due to the lack of an estate, no fees,			
~	Notice of		commissions, bond fee, or certification fee is			
	Hrg		requested.			
~	Aff.Mail	W				
	Aff.Pub.		Petitioner prays that the report be settled, all			
	Sp.Ntc.		acts and proceedings of Petitioner as Administrator be confirmed and approved,			
	Pers.Serv.		and that the Public Administrator be			
	Conf.		discharged as Administrator.			
	Screen		_			
~	Letters					
	Duties/Supp					
	Objections					
	Video					
	Receipt					
	CI Report					
~	9202					
~	Order					
	Aff. Posting			Reviewed by: skc		
	Status Rpt			Reviewed on: 8-22-13		
	UCCJEA			Updates:		
	Citation			Recommendation:		
	FTB Notice			File 4 – Rios		

Atty

Herold, Kim M. (for Melissa K. Watters – Administrator)

(1) First and Final Report of Status of Administration and Account and (2) Petition for Settlement Thereof, for (3) Allowance of Statutory Attorney's and Executor's Compensation, for Reimbursement of Costs Advanced, for (4) Order for Withdrawal of Funds from Blocked Account and for (5) Final Distribution

DO	D: 10-12-12	MELISSA K. WATTERS, Daughter and	NEEDS/PROBLEMS/COMMENTS:
		Administrator with Limited IAEA with funds in a	
		blocked account, is Petitioner.	
		Account period: 12-12-12 through 6-11-13	
	Aff.Sub.Wit.	Accounting: \$300,262.27	
>	Verified	Beginning POH: \$300,261.49	
>	Inventory	Ending POH: \$300,262.27	
~	PTC	(\$110,262.27 cash plus real property)	
~	Not.Cred.		
>	Notice of Hrg	Administrator (Statutory): \$9,005.25	
~		V Attacas as (Ct at the 2 A) 60 005 05	
	Aff.Pub.	Attorney (Statutory): \$9,005,25	
	Sp.Ntc.	Administrator (Reimburse for property tax	
	Pers.Serv.	payments): \$1,435.40	
	Conf. Screen		
~	Letters	Administrator (Reimburse for funeral expenses):	
	Duties/Supp	\$ 7,984.79	
	Objections		
	Video Receipt	Costs: \$1,844.50 (filing, certified copies,	
	CI Report	recording)	
~	9202		
~	Order	Distribution pursuant to intestate succession	
	Aff. Posting	and agreement between heirs:	Reviewed by: skc
	Status Rpt	Melissa K. Watters: Real property on Terrace	Reviewed on: 8-23-13
	UCCJEA	— plus \$15,493.54 cash	Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice	Jonathan Vaughn Watters: Real property on	File 5 – Watters-Weiser
		Echo* plus \$65,493.54	
		* The atterney's for length sin \/si che \/\	
		* The attorneys for Jonathan Vaughn Watters have filed an Assignment of Interest in this	
		matter for \$10,000.00 payable to Wild, Carter &	
		Tipton from his share of the estate	
		I I PTOTT I OTT I I I I I I I I I I I I I I I	

6 Antranik Kalebjian (Estate)

Case No. 13CEPR00108

Atty Istanboulian, Flora, sole practitioner (for Petitioner Antoine E. Homsi, Executor)

- (1) First and Final Report of Executor on Waiver of Account and
- (2) Petition for Final Distribution

DOD: 1/24/2013		ANTOINE E. HOMS	SI , nephew	and Executor, is	NEEDS/PROBLEMS/COMMENTS:	
		Petitioner.				
		Accounting is waived.		Note: Status Hearing for the filing of the first account and/or petition for final distribution currently set for		
Со	nt. from		1&A		\$165,000.00	5/9/2014 has been taken off
	Aff.Sub.Wit.		POH	_	\$165,000.00	calendar.
✓	Verified				(no cash)	
✓	Inventory					
✓	PTC		Executor	_	waives	
√	Not.Cred.		Attorney		\$5,950.00	
✓	Notice of Hrg		(statutory; to be p	aid outside	• •	
✓	Aff.Mail	W/				
	Aff.Pub.					
	Sp.Ntc.		Distribution pursuo		edent's Will and	
	Pers.Serv.		Codicil to Will is to) :		
	Conf. Screen		ANTOINE E. HOMS	SI – entire e	state consisting of	
	Letters		real property, hou			
	Duties/Supp		furnishings, and ve	ehicle.		
	Objections					
	Video Receipt					
	CI Report					
1	9202					
√	Order					
	Aff. Posting					Reviewed by: LEG
	Status Rpt					Reviewed on: 8/23/13
	UCCJEA					Updates:
	Citation					Recommendation: SUBMITTED
✓	FTB Notice					File 6 – Kalebjian

Atty

Johnson, Summer A. (for Saint Anselm of Canterbury Episcopal Church – Petitioner)

Petition for Appointment of Successor Trustee and for Termination and Distribution of Trust or, in the Alternative, Modification of Trust Terms [Prob. C. 15408, 15409, 15660(d), 17200(b)(10)]

	thleen DOD:				
07	07/21/90				
	ırry DOD:				
08	/12/95				
Co	ont. from 052013,				
07	3113				
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	W			
		/			
	Aff.Pub.				
	Sp.Ntc.				
Pers.Serv.					
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
	Order	Х			
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				

SAINT ANSELM OF CANTERBURY EPISCOPAL CHURCH, beneficiary, is Petitioner.

Petitioner states:

- On 05/27/87, Harry E. Kelly and Kathleen M. Kelly established THE KELLY FAMILY TRUST ("Trust") appointing themselves as the initial Co-Trustees. Kathleen Kelly died on 07/21/90. After her death, Harry Kelly continued to serve as sole Trustee.
- 2. On 03/29/93, Harry Kelly exercised his general power of appointment and executed the Third Amendment to (and Complete Restatement of) the Trust.
- On 10/21/94, Harry Kelly executed a Fourth Amendment to the Trust, which amended the provisions regarding the nomination of the successor trustees following Harry Kelly's death or incapacity.
- 4. On 05/31/95, Harry Kelly executed a final amendment to the Trust and further amended the provisions for the nomination of a successor trustee following his death or incapacity. The Fifth Amendment provided that following the death or incapacity of the current acting trustee, the following would serve as successor trustee in the order designated:
- "That person or entity (and successor persons and entities) nominated in writing signed by Harry E. Kelly; in the absence of such written designation
- 2. Jane Dietsche of Garden Grove, California; and thereafter
- 3. That bank or other corporation authorized to act as trustee in the place of administration of Trust, which has net assets in excess or Ten Million Dollars (\$10,000,000.00) and which is unanimously designated as successor Trustee in writing signed by all adult competent beneficiaries then entitled to the income from this Trust and the trust estates created hereunder (and in the absence of such designation, then as designated by a court of competent jurisdiction)."

The Fifth Amendment also deleted two (2) specific devises of \$5,000.00 each to Harry Kelly's grandniece and her husband.

Continued on Page 2

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 07/31/13

Continued from 5/20/13. Minute order states the Court grants the petition for appointment of successor trustee and appoints Bruce Bickel. The Court indicates to the parties that it will entertain an order reflecting that Bruce Bickel, as trustee may accept checks written to the former trustee and make distribution(s) according to the terms of the trust. The Court directs Ms. Johnson to provide the court additional information regarding the status of the corpus and how the church will secure/use income or principal. The remaining issues are continued to 7/31/13.

Declaration of Summer Johnson filed on 7/22/13 states after speaking with the drafting attorney and conferring with Petitioner, counsel believes that she will be in a position to present the Declaration along with a detailed proposal from the Church concerning the use of Trust principal for a special program as part of one package in approximately 28 days. As a result, Counsel requests this matter be continued to August 28, 2013.

As of 08/23/13, nothing further has been filed.

Reviewed by: JF
Reviewed on: 08/23/13
Updates:
Recommendation:

File 7 – Kelly

- 5. Harry Kelly passed away on 08/12/95 and Jane Dietsche began serving as successor trustee of the Trust. Initially, Mrs. Dietsche administered the Trust from Garden Grove, CA, but in 2009, she suffered a stroke and moved to Fresno where Trust administration continued until her death on 11/20/12.
- 6. Pursuant to the terms of the Trust, after payment of Harry Kelly's debts, last illness, funeral and administration (including attorney's fees) expenses and all estate, inheritance and other death taxes, the entire remaining trust balance "shall continue to be held by the Trustees for the benefit of Saint Anselm of Canterbury Episcopal Parish Church". The trust estate to be held was to be referred to as "The Kathleen M. Kelly and Harry E. Kelly Fund" (the "Fund").
- 7. The Trust terms specified that the Fund was to be used for the following purposes:
 - "The Fund is to be used solely for charitable purposes. Settlor requests that the Fund be a perpetual one, which is to say that only interest, dividends and other income earned by the Fund should be used and any income <u>not</u> used should be reinvested, unless otherwise required by state or federal laws. The Fund may not use any funds whatsoever to pay salaries of church personnel, to purchase or lease any vehicle of any kind, or for the up-keep, repair or improvement of buildings. The Trustees are to review all requests for funds and shall approve all expenditures. Some examples of the use of the Fund are flowers at church and memorial services, membership drives to attract new members, and other special programs."
- 8. Due to the death of Jane Dietsche, there is presently no one acting as Trustee of the Trust. Petitioner requests that the Court appoint a successor trustee to fill the vacancy.
- 9. Per the terms of the Trust, upon the death of Jane Dietsche, the next nominated successor trustee to serve is:
 - "That bank or other corporation authorized to act as trustee in the place of administration of Trust, which has net assets in excess or Ten Million Dollars (\$10,000,000.00) and which is unanimously designated as successor Trustee in writing signed by all adult competent beneficiaries then entitled to the income from this Trust and the trust estates created hereunder (and in the absence of such designation, then as designated by a court of competent jurisdiction)."
- 10. Presently, Saint Anselm of Canterbury Episcopal Church is the only beneficiary entitled to income of the Trust. There are no other beneficiaries of the Trust presently entitled to income. It is unclear whether Saint Anselm of Canterbury Episcopal Church is considered an "adult competent beneficiary". In light of such ambiguity, Petitioner has made a nomination pursuant to Probate Code § 15660(d) for professional fiduciary Bruce D. Bickel to be appointed as successor Trustee of the Trust. Bruce D. Bickel has consented to serve as Successor Trustee and Petitioner requests that the Court appoint him to serve as successor Trustee.
- 11. The Trust terms state "no bond shall be required of any Trustee or Co-Trustee of this Trust". Consequently, Petitioner requests that Mr. Bickel be appointed without the requirement of posting a bond.
- 12. Petitioner requests that the Court order the termination of the Trust pursuant to Probate Code § 15408, which authorizes the Court to order the termination of the Trust, "if the Court determines that the fair market value of the principal of a trust has become so low in relation to the cost of administration that continuation of the trust under its existing terms will defeat the accomplishment of its purposes."

Continued on Page 3

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13. In 2011, the brokerage accounts held by the Trust generated \$8,992 in dividend and interest income. In 2012, the brokerage accounts held by the Trust generated \$10,486 in dividend and interest income. As of 12/31/12, the Trust assets consisted of the following:

i.	American Funds Account No. xxxx9946	\$74,051.27
ii.	Vanguard Account No. 0028-xxxxxxxxx	\$36,551.23
iii.	Vanguard Account No. 0030-xxxxxxxxx	\$58,742.02
iv.	Vanguard Account No. 0027-xxxxxxxxx	\$23,225.65
٧.	Vanguard Account No. 0521-xxxxxxxxx	\$84,829.60
vi.	Vanguard Account No. 0073-xxxxxxxxx	\$43,598.86

Total: \$320,728.63

- 14. Prior to Mrs. Dietsche's death, she had a practice of waiving her Trustee's fees. As a result of Mrs. Dietsche's waiver of her Trustee's fee, a greater percentage of the net income was available to distribute to Petitioner for its use. Moving forward however, the Trust will be responsible for paying a Trustee's fee. The standard fee is approximately 1% of the value of the Trust paid annually. Presently this amount will be approximately \$3,200 per year based on the value of the Trust estate. Coupled with the annual cost to prepare the federal and state tax returns of approximately \$1,500.00 and the cost per year of the account fees associated with the above accounts, the net income available for distribution drops to less than 40-50% of the Trust's annual income. Under the circumstances, while the net income may be available to sustain the Trust without reducing the principal, the amount of principal generating the dividends and income is of limited amount. Consequently, the resulting net income of the Fund provides limited ability for the Petitioner to fulfill the Settlor's stated intent that the Fund be used for special programs at the church.
- 15. In the alternative, Petitioner requests Termination or Modification of the Trust due to changed circumstances pursuant to Probate Code § 15409(a) which authorizes the Court to "modify the administrative or dispositive provisions of the trust or terminate the trust if, owing to circumstances not known to the settlor and not anticipated by the settlor, the continuation of the trust under its terms would defeat or substantially impair the accomplishment of the purposes of the trust." Petitioner believes that the Settlor did not anticipate that the annual costs associated with administering the Fund would sufficiently deplete the annual dividends and income of the Trust available for distribution such that Petitioner's ability to meaningfully fulfill the Settlor's requested uses for the Fund would be severely limited in scope. Consequently, Petitioner requests that the Trust be terminated and the funds be distributed to Petitioner for their use consistent with the Settlor's stated intent
- 16. If the Court does not approve the termination of the Trust as requested, Petitioner requests that the Court approve a modification of Article IV, Section D.1 of the Trust terms which would allow the distribution of Trust net income <u>and principal</u> by the Successor Trustee to Petitioner consistent with the parameters established for the Fund's use by the Settlor.

Petitioner requests an Order that:

- 1. Bruce D. Bickel be appointed to serve as Successor Trustee without bond; and
- 2. The Kelly Family Trust, dated May 27, 1987, as amended and completely restated on March 29, 1993, as amended, be terminated and the assets held by the Trust be delivered by the Successor Trustee to Petitioner.

Consent to Petition for Termination of Trust filed 05/16/13 by the Rt. Rev. J. Jon Bruno, D.D. of the Episcopal Church, Diocese of Los Angeles states: they are the alternate contingent remainder beneficiary of the Kelly Family Trust, dated 05/27/87 as amended and consent to the termination of the Trust.

Consent to Appointment as Successor Trustee filed 05/16/13 by Bruce Bickel.

Atty Motsenbocker, Gary L. (for David R. Borges – son/Petitioner)

Petition for Letters of Administration (Prob. C. 8002, 10450)

DOD: 12/14/12			DAVID R. BORGES, son, is Petitioner, and requests	NEEDS/PROBLEMS/COMMENTS:
			appointment as Administrator without bond.	
			Full IAEA – OK	Need name and date of death of deceased spouse pursuant to
			Petitioner (contended sole heir) waives bond.	Local Rule 7.1.1D.
Со	Cont. from		reilloner (contended sole heir) walves bond.	Nata li aith agu ill ia ta la a galgaitte al ta
	Aff.Sub.Wit.		Petitioner states that 2 holographic wills have	Note: If either will is to be admitted to Probate, will need Proof of
✓	Verified		been located, both executed on the same day. One of them leaves the entire estate to Petitioner	Holographic Instrument.
	Inventory		and the other leaves the entire estate to	
	PTC		Cornerstone Church. Petitioner states that he does not believe that either will should be	Note: If the Petition is granted, status hearings will be set as follows:
	Not.Cred.		admitted to probate. He believes that the	110dili 193 vviii 50 301 d3 10110vv3.
✓	Notice of Hrg		decedent was in a state of confusion at the time	Friday, January 31, 2014 at
✓	Aff.Mail	w/	she executed the documents. This is supported by the fact that she executed the alleged wills on	9:00 am in Dept. 303 for filing of the Inventory & Appraisal;
✓	Aff.Pub.		the same date and the "wills" had different	and
	Sp.Ntc.		beneficiaries. Petitioner states that the decedent had a long history of mental illness and suffered	Friday, October 31, 2014 at
	Pers.Serv.		from long bouts of depression with delusions for	9:00 am in Dept. 303 for filing of the Accounting and/or
	Conf. Screen		most of her adult life. She was diagnosed as bi-	Petition for Distribution
✓	Letters		polar with severe depression many years ago; her bouts of erratic, chaotic behavior are a matter of	
✓	Duties/Supp		public record. She has been under care and	
	Objections		treatment for most of her adult life. Both documents were scribbled in a notebook.	
	Video		Petitioner believes that the decedent lacked	
	Receipt		capacity to execute these documents and was	
	CI Report		suffering from a mental illness such that she was incapable of forming the requisite testamentary	
	9202		intent at the time she wrote these documents.	
✓	Order	l	Cornerstone Church will be provided noticed of this petition and Petitioners contentions.	
	Aff. Posting		it is perilion and remioners contentions.	Reviewed by: JF
	Status Rpt		Residence: Fresno	Reviewed on: 08/23/13
	UCCJEA Citation		Publication: The Business Journal	Updates: Recommendation:
	FTB Notice		Estimated Value of the Estate:	File 11 – Lokey
	LIB MONCE		Real property - \$128,500.00	THE II - LOKEY
			Probate Referee: STEVEN DIEBERT	

11

S.

Gonzales, Nicole (pro per – paternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Priscilla, 8	TEMPORARY EXPIRES 08/28/13	NEEDS/PROBLEMS/COMMENTS:
Mariah, 3 Cont. from	NICOLE GONZALES, paternal aunt, is Petitioner. Father: ANTHONY D. GONZALES – currently incarcerated Mother: DELIA M. GALINDO – personally served	Need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Guardianship Petition or Consent & Waiver of Notice for:
Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt	Paternal grandfather: DANIEL GONZALES – served by mail on 08/19/13 Paternal grandmother: CECELIA GONZALES – served by mail on 08/19/13 Maternal grandfather: UNKNOWN Maternal grandmother: THERESA MARTINEZ – served by mail on 08/19/13 Sibling: XAVIER GALINDO Petitioner alleges that neither parent is capable of caring for the minors. Court Investigator Julie Negrete filed a report on 08/21/13.	2. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Guardianship Petition or Consent & Waiver of Notice or Declaration of Due Diligence for: - Maternal grandfather - Xavier Galindo (half-brother), if 12 or over 3. Need UCCJEA. Reviewed by: JF Reviewed on: 08/23/13
UCCJEA X Citation FTB Notice		Updates: Recommendation: File 12 – Gonzales
FID NOTICE		rile 12 - Gonzales

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